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Europe Needs America: NATO, Ukraine and the Limits of Strategic Autonomy

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Executive summary

Europe can assume more responsibility for its own security. It cannot replace the United States at short notice. The core problem is not only money. It is nuclear deterrence, strategic lift, command structures, intelligence, air and missile defence, munitions production, global basing, political risk tolerance and the ability to sustain a long war industrially and economically. Without American leadership, NATO defence remains possible, but it becomes slower, more expensive and politically less reliable.

The debate on European strategic autonomy is often framed as if higher defence spending and political will could turn Europe into an autonomous great-power security actor within a few years. That assumption is dangerous. At The Hague in 2025, NATO Allies committed to a 5% of GDP defence-and-security investment target by 2035: at least 3.5% for core defence requirements and up to 1.5% for broader security-related investments such as critical infrastructure, networks, civil preparedness, innovation and defence-industrial capacity. This is a serious shift. It is not a substitute for the current American role as the Alliance's nuclear, logistical, industrial and operational anchor.

For Ukraine, the question is immediate. Russia is not fighting a war that can be ended by European rhetoric. Moscow responds to costs, industrial exhaustion, military defeat, political cohesion and credible guarantees. If Washington appears uncertain while Europe talks about autonomy without possessing the corresponding capabilities, the result is not sovereignty. It is a strategic gap that Russia can exploit.

For companies, foundations, media organisations, NGOs and asset owners with exposure to Europe or Ukraine, planning should assume a prolonged phase of transatlantic friction. The Alliance is unlikely to disappear. It will, however, depend more visibly on US domestic politics, European fiscal capacity, munitions production, energy prices, election cycles and public war fatigue. Protection therefore lies less in assuming a stable grand strategy than in defining operational triggers: US force-posture reviews, reduced Ukraine support, delayed European procurement, Russian escalation against critical infrastructure, and political signals that weaken Article 5 credibility.

What matters now

The United States remains the central deterrence anchor. Europe's security architecture was not built as an autonomous European system after 1945. It was organised around American leadership. This applies not only to military mass, but to the layers that decide crisis outcomes: the nuclear guarantee, strategic intelligence, airlift, missile defence, global communications, command architecture, precision munitions, industrial depth and political coordination. European states can build individual capabilities. They cannot quickly replace the full American system.

The 5% target does not automatically close the capability gap. NATO's Hague commitment provides a credible framework: 3.5% of GDP for core defence and 1.5% for broader security investments by 2035. It forces European governments to act more seriously. The decisive question is what the money buys. Platforms alone do not create

warfighting capacity. Europe needs munitions stockpiles, spare parts, maintenance, counter-drone systems, air defence, command resilience, cyber defence, military mobility, protected infrastructure and personnel models that can endure sustained pressure.

Strategic autonomy can strengthen or weaken deterrence. As a capability agenda, greater European responsibility is useful. As a political substitute for NATO, it is risky. If autonomy means more ammunition, air defence, heavy brigades, ports, rail corridors, medical chains and resilience, it strengthens the Alliance. If it means rhetorically downgrading American leadership before Europe has built the substance, it weakens deterrence.

Russia assesses gaps, not declarations. Moscow does not need to believe that NATO is collapsing. It is enough if the Kremlin concludes that decision-making is slow, budgets are unstable, societies are fatigued and guarantees are negotiable. Those assumptions affect Russian risk tolerance. The key question for the next 24 months is not whether Europe will spend more in ten years. It is whether Russia sees costs and limits today.

Current operating picture

The war in Ukraine has exposed the design flaw in Europe's post-Cold War security model. Many European states grew used to a system in which American power covered the worst case while national budgets harvested the peace dividend. Since 2022 this has changed, but unevenly. Poland, the Baltic states and several Nordic states are moving faster than large western European economies. Germany, France, Italy and the United Kingdom remain politically and industrially central, but their ability to generate hard military mass quickly remains limited.

NATO data and CSIS analysis show a clear rise in European defence spending. European Allies are moving toward higher budgets. The gap to the United States nevertheless remains large. The United States still provides the largest share of strategic reach, global presence, nuclear deterrence and high-end military technology. Europe can reduce this gap if it invests consistently for a decade. It cannot close it by adopting a political formula.

Ukraine remains the test case. The front demonstrates that modern warfare is both industrial and technological. Drones alter tactics, visibility and survivability. Artillery, air defence, electronic warfare, mines, fortifications, medical support and spare-parts chains still matter. Sustained support to Ukraine requires more than individual weapons packages. It requires production lines, training, maintenance, ammunition, predictability and political backing. This is where American involvement remains central.

The US debate is also real. Washington is demanding more burden sharing, reviewing force posture, prioritising the Indo-Pacific and asking for clearer returns on American commitments in Europe. This criticism is not new, but it has become politically sharper. Europe cannot answer it with moral appeals. It must demonstrate that it complements American leadership rather than free-riding on it.

Key risk mechanisms

1. Deterrence is weakened by ambiguity

Deterrence requires capability and credible intent. If Washington, London, Paris, Berlin and Warsaw send different signals, uncertainty grows. Russia can infer that escalation below the formal NATO threshold has more room. The most dangerous areas are grey-zone actions: cyber attacks, sabotage against infrastructure, GPS interference, border provocation, covert operations, migration pressure and attacks on logistics routes that may not immediately be treated as acts of war.

For organisations, this grey zone is more relevant than a classic armoured offensive. Damage to undersea cables, rail corridors, energy sites, ports, data centres or satellite navigation can disrupt business processes without a formal conflict declaration. This makes early indicators important: official warnings, insurance changes, port restrictions, increased policing, cyber alerts, airspace limits and local emergency drills.

2. Europe is buying time, not automatic effect

Higher budgets are necessary. They are not military output. European procurement remains slow, nationally fragmented and politically complex. Joint programmes save time only when they produce clear requirements, fast contracts and industrial scaling. If they become distribution politics between states, they delay effect.

The next few years will therefore be a dangerous transition period: more money has been pledged, but many capabilities are not yet available. This gap affects air defence, long-range precision fires, ammunition, counter-drone systems, bridging and engineer capacity, medical chains, strategic transport and critical infrastructure protection. Russia does not need to exploit this gap forever. It only needs to generate pressure before European programmes mature.

3. Ukraine support is an industrial test

Ukraine needs predictability. Individual support packages matter, but operational effect comes from reliable supply chains. If ammunition, spare parts and air defence arrive irregularly, Kyiv must take different operational risks. Russia, China, Iran and North Korea are also watching whether Western democracies can sustain industrial war. The answer shapes deterrence in Europe, Asia and the Middle East.

A credible strategy keeps Russia under sustained cost pressure: sanctions, energy and technology restrictions, military support to Ukraine, industrial scaling and political clarity. If one pillar breaks, Moscow can play for time. That remains Russia's central advantage.

4. European domestic politics becomes a security factor

Defence spending competes with social budgets, infrastructure, migration, energy costs and debt debates. The longer the war lasts, the stronger the temptation to treat security as a budget problem rather than a protection system. Populist parties can use this tension through isolationism or through peace rhetoric without enforcement mechanisms.

Security leaders should therefore treat election calendars, budget votes and public support for Ukraine as operational indicators. Political fatigue can delay deliveries, dilute sanctions and postpone investment.

5. China is assessing the Alliance

The transatlantic debate is being read in Beijing. If the United States remains engaged in Europe while Europe carries more of its own burden, the overall Western position strengthens. If the United States withdraws and Europe attempts unfinished autonomy, China gains strategic room. Conversely, a stronger European pillar can help Washington prioritise the Indo-Pacific without abandoning Europe.

The decisive point is not whether Europe or America is more important. It is the combination: American power plus European mass, industry and geography. That combination remains stronger than either pillar alone.

Capability gaps rhetoric cannot close

Air and missile defence. Europe has too few systems, too few interceptors and too little industrial replenishment capacity for a long high-intensity conflict. Ukraine shows that defence against drones, cruise missiles and ballistic systems is not a niche requirement. Without American support, prioritisation becomes harsher: capitals, ports, airfields, defence plants and troop movements compete with civilian infrastructure.

Munitions and spare parts. Deterrence needs stocks. Many European states can procure equipment, but cannot consume and replace it fast enough. This affects artillery ammunition, air defence, precision strike, armoured vehicles, drones, electronic warfare and medical consumables. An Alliance that replenishes at peacetime speed loses political freedom in a long war.

Strategic mobility. Defence of the eastern flank depends on rail corridors, bridges, ports, border procedures, fuel, heavy transport and legal permissions. This layer is unspectacular but decisive. Russia does not need to defeat every brigade if it can delay movement, supply or political clearance.

Command and situational awareness. The United States provides much of the intelligence, communications and command capability that binds NATO together in crisis. Europe can build more, but national systems must be interoperable, protected and politically releasable. Without a shared operating picture, fast decisions become riskier.

Early warning indicators

- Official US announcements on force-posture reviews, troop reductions, air-defence relocations or changed NATO funding contributions.
- European budget decisions that postpone the 3.5% core-defence target or dilute it with non-military spending.
- Delays in ammunition, air-defence, counter-drone and military mobility programmes.
- Russian sabotage, cyber or influence activity against European infrastructure below the open-war threshold.
- New Russian strike patterns against Ukrainian energy, rail, port or defence-industrial infrastructure.
- Political signals from Washington that weaken Ukraine guarantees, NATO assistance or sanctions.
- European debates that define strategic autonomy as a NATO substitute rather than capability-building.
- Insurance exclusions, port restrictions, airspace limitations or official warnings in the Baltic, Black Sea or eastern-flank states.

Implications for organisations

Organisations with exposure to Europe, Ukraine or the NATO eastern flank should not plan on a stable political baseline. The more likely environment is a long phase of friction: Russia tests boundaries, Europe builds capabilities, the United States demands more burden sharing, and businesses face changing government guidance. This affects not only security teams. It affects supply chains, insurance, sites, personnel travel, communications, data availability and crisis leadership.

For sites in Poland, the Baltics, Finland, Romania, Germany, Czechia, Slovakia and Black Sea-adjacent areas, critical infrastructure should be reprioritised: power supply, backup generation, communications redundancy, physical access control, supplier dependence and evacuation logic. For Ukraine-linked operations, predictability is central: organisations supporting staff, partners or aid structures need decision rules for air alerts, power cuts, border delays, medical evacuation and local transport.

The main board-level risk is false normalisation. The fact that NATO continues to function does not mean that the risk environment is stable. The Alliance remains strong, but its political and industrial load is increasing. Organisations should not wait for a dramatic rupture. They should take smaller changes seriously because modern security crises enter business processes gradually.

Recommended actions

1. Include alliance risk in corporate planning. Organisations should build a simple matrix: what happens if US support to Ukraine is delayed, if Russia strikes infrastructure near supply chains, if NATO force posture changes, or if new sanctions are imposed? Each assumption needs an owner and a trigger.

2. Separate eastern-flank and Ukraine exposure. A generic Europe risk rating is insufficient. Poland, the Baltics, Finland, Romania, Germany, Czechia, Slovakia, Black Sea logistics and Ukraine-linked activity carry different exposure. Travel,

supply-chain and site approvals should reflect these differences.

3. Audit critical service providers. Security providers, drivers, hotels, IT vendors, logistics partners and medical providers should be tested for crisis performance. The key question is not their brochure. It is whether they can deliver during a power outage, border delay, mobile-network disruption or government restriction.

4. Connect cyber and physical security. Russian and Russia-linked activity is not only military. Phishing, sabotage, disruption, data theft and disinformation can hit the same organisation that is managing personnel movements or deliveries. Crisis teams should merge cyber and site security reporting.

5. Prepare communications in advance. Organisations should define who speaks during escalation, what terms are used, when travel pauses and how staff are informed. Unclear language delays action.

Scenarios for the next 12 to 24 months

Scenario 1: Strengthened NATO with American leadership and greater European mass. This is the best realistic case. The United States remains the leading power, Europe increases spending, procurement and industrial output, and Ukraine receives predictable support. Deterrence improves even if the front remains difficult. For organisations, this does not mean a return to the old normal, but it creates a more calculable risk environment.

Scenario 2: Formal alliance continuity with political uncertainty. NATO remains intact, but Washington scrutinises forces, bases and contributions more aggressively; Europe pledges more but delivers slowly; Russia tests grey zones. This is the most likely scenario. It does not create a single system crisis, but many operational frictions. Local triggers matter more than strategic declarations.

Scenario 3: Autonomy rhetoric without sufficient substance. Europe speaks more about independence but cannot replace American functions. Russia and China read this as Western fragmentation. This increases the risk of miscalculation. The likely pressure points are below the Article 5 threshold: the Baltic Sea, Black Sea logistics, undersea cables, energy infrastructure, disinformation and intimidation of border states.

Scenario 4: US Indo-Pacific prioritisation without adequate European compensation. Washington shifts more attention and capabilities toward China while Europe is still building. This would not automatically break NATO, but it would create a deterrence problem. European states would need to move faster on ammunition, air defence, counter-drone systems, mobility and critical-infrastructure protection.

Decision logic for security leaders

The key leadership question is not whether a transatlantic rupture will occur. It is how much friction an organisation can tolerate before it reassesses travel, sites or supply chains. A good system defines thresholds before the crisis. These include political, military, infrastructure and business triggers.

At the political level, official US and NATO signals matter more than media commentary. A relocation of air defence, a delay in Ukraine aid, a new dispute over contributions or a formal force-posture review has immediate planning value. At the military level, Russian activity against energy, ports, rail, satellite navigation and border areas matters. At the infrastructure level, disruptions to undersea cables, power grids, rail corridors, logistics terminals and data centres matter. At the business level, insurance changes, bank reviews, delivery delays, travel restrictions and local government requirements matter.

Organisations should not bury these triggers in a generic risk matrix. They should attach decisions to them: who may travel, which sites shift to contingency operation, which suppliers need alternatives, when local guarding is increased, when family members leave a location, and when a board meeting is moved. These decisions look mundane. In a political grey zone, they separate controlled adaptation from improvised crisis response.

Selected sources

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- US and Allied public statements on Ukraine support, NATO deterrence and defence investment.

Method note

This report is based on open-source material reviewed up to 19 August 2026 and analytical assessment by SF Custos Global. It does not replace legal, insurance, sanctions, medical or country-specific professional advice.